



State of Montana
Department of Administration
State Information Technology Services Division

Microsoft Enterprise Agreement Renewal Management Plan

Prepared by: SAM Program Office
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Microsoft Enterprise Agreement Renewal Management Plan

Renewal Management Plan: Document Change Log			
Revision	Date	Author	Description of Change
1.0	12/6/13	S. Edgar	Draft Started
1.1	12/27/13	S. Edgar	Added team sections. Deleted change and risk mgmt.. sections.
1.2	1/2/14	S. Edgar	Added add'l teams. Updated Table of Contents.



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I. INTRODUCTION

Renewal Description

State Information Technology Services Division (SITSD) currently has three agreements with Microsoft; Select Plus, Enterprise, and Premier Support. The agreement currently being renewed is the Microsoft Enterprise Agreement. The renewal is due to be completed no later than May 31, 2014.

Renewal Management Plan Purpose

The Renewal Management Plan provides an approved guide for how the renewal will be managed to deliver a cost effective renewal.

Among other things, the plan achieves the following:

- Establishes the renewal team organization;
- Defines roles and responsibilities;
- Establishes methods for renewal oversight and control.

Microsoft Enterprise Agreement Renewal Goal

The overall goal for the Microsoft Enterprise Agreement Renewal process is to maximize the value of the State of Montana's Enterprise Agreement. In order to achieve this goal, the following objectives will need to be met.

- **Objective:** Inform the Enterprise of the full value of the licensing entitlements and additional benefits contained in the Enterprise Agreement.
- **Objective:** Develop and implement an effective process for renewing Microsoft Agreements.

II. ROLES AND RESPONSIBILITIES

The Microsoft Enterprise Agreement Renewal process will consist of three principle and two supporting teams of personnel tasked with developing a complete understanding of the Microsoft Enterprise Agreement, its costs and benefits.

Renewal Teams

- State IT Managers Microsoft Enterprise Agreement Renewal Team
- SITSD Microsoft Enterprise Agreement Renewal Team
 - Contract/License Supporting Team
 - Financial Supporting Team
- Microsoft Enrollment Coordinators Team



Microsoft Enterprise Agreement Renewal Management Plan

State IT Managers Microsoft Enterprise Agreement Renewal Team

The overall goal of the team is to advise and inform the State Chief Information Officer of agency Microsoft issues and concerns.

- **Objective:** Review and discuss State roadmap for Microsoft products.
- **Objective:** Review and discuss findings from the other Microsoft Enterprise Agreement renewal teams.

TITLE	AGENCY	NAME	ROLE	RESPONSIBILITY
State CIO (Chief Information Officer)	DOA/SITSD	Ron Baldwin	Executive Approval	Provides leadership and has overall responsibility for renewal processes and outcome, and serves as final Executive Approver for renewal purposes.
CFO (Chief Financial Officer)	DOA/SITSD	Doug Volesky	Executive Sponsor/Approver	Makes financial decisions to ensure a successful renewal. Serves as Executive Sponsor and Executive Approver. Will be kept fully informed of the process in order to adjust financial provisions as new information comes to light, and considers both the costs and benefits of potential changes to the Enterprise Agreement.
CTO (Chief Technology Officer)	DOA/SITSD	Dave Carlson	Technology Management (Server/Database)	Ensures the team is aware of the business value of the software and the operational impact of any disruption to the service it supports. Ensures installation or usage reporting is available to meet Microsoft's requirements, and that any software is properly deployed and counted.
COO (Chief Operations Officer)	DOA/SITSD	Warren Dupuis	Technology Management (Desktop/Client/Operations)	Ensures the team is aware of the business value of the software and the operational impact of any disruption to the service it supports. Ensures installation or usage reporting is available to meet Microsoft's requirements, and that any software is properly deployed and counted.
CISO (Chief Information Security Officer)	DOA/SITSD	Lynne Pizzini	Security	Provides advice on the security implications of renewal decisions. Consulted as to whether requested information is appropriate for sharing with a third party (if third party request includes details of a technical or policy nature which may impact network security or regulatory concerns). Where the third party has a requirement for data to be supplied either physically or electronically, the CISO (or designee) should confirm the processes required to secure the information.
CIRO (Chief Intergovernmental Relations Officer)	DOA/SITSD	Tammy LaVigne	Interagency/Public Relations	Serves as the central source of departmental information. Assists with development and implementation of communication plan for the renewal. Facilitates information sharing between agencies and SITSD and responds to inquiries made by the public.
SAM Program Manager	SAM Program	Maris Cundith	Renewal Process Manager	Provides management of renewal from beginning to end. Duties include establishing the desired make-up of renewal teams,



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	Office			locating and consolidating information needed to conduct the renewal, provide contract details relating to the renewal including license terms and conditions, license metrics, reporting requirements, contract terms, and other relevant information. Serves as primary contact point with Microsoft. Schedules and facilitates meetings with teams and others as necessary.
CIO	DOJ	Joe Chapman	Agency Representative	Advise and inform the State CIO of DOJ Microsoft issues and concerns.
CIO	DLI	George Parisot	Agency Representative	Advise and inform the State CIO of DLI Microsoft issues and concerns.
Agency IT Manager	DOR	Tim Bottenfield	Agency Representative	Advise and inform the State CIO of DOR Microsoft issues and concerns.
Agency IT Manager	SOS	Mark Van Alstyne	Agency Representative	Advise and inform the State CIO of SOS Microsoft issues and concerns.
Agency IT Manager	COR	John Daugherty	Agency Representative	Advise and inform the State CIO of CORR Microsoft issues and concerns.
CIO	DEQ	John Chelini	Agency Representative	Advise and inform the State CIO of DEQ Microsoft issues and concerns.
CIO	DPHHS	Stuart Fuller	Agency Representative	Advise and inform the State CIO of DPHHS Microsoft issues and concerns.
CIO	DNRC	Bill Anker	Agency Representative	Advise and inform the State CIO of DNRC Microsoft issues and concerns.
Agency IT Manager	AGR	John Dayton	Agency Representative	Advise and inform the State CIO of AGR Microsoft issues and concerns.
Branch IT Manager	JUD	Lisa Mader	Branch Representative	Advise and inform the State CIO of JUD Microsoft issues and concerns.
Branch IT Manager	LEG	Dale Gow	Branch Representative	Advise and inform the State CIO of LEG Microsoft issues and concerns.
CIO	MDT	Mike Bousliman	Agency Representative	Advise and inform the State CIO of MDT Microsoft issues and concerns.
CIO	STF	Al Parisian	Agency Representative	Advise and inform the State CIO of STF Microsoft issues and concerns.
CIO	DOC	Larry Krause	Agency Representative	Advise and inform the State CIO of DOC Microsoft issues and concerns.
CIO	FWP	Barney	Agency	Advise and inform the State CIO of FWP Microsoft issues and



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		Benkleman	Representative	concerns.
Agency IT Manager	GOV	John Noble	Agency Representative	Advise and inform the State CIO of GOV Microsoft issues and concerns.
Agency IT Manager	HIS	Chris Carson	Agency Representative	Advise and inform the State CIO of HIS Microsoft issues and concerns.
Agency IT Manager	LIV	James Newhall	Agency Representative	Advise and inform the State CIO of LIV Microsoft issues and concerns.
CIO	MSL	Evan Hammer	Agency Representative	Advise and inform the State CIO of MSL Microsoft issues and concerns.
Agency IT Manager	PSC	Ousmane Loum	Agency Representative	Advise and inform the State CIO of PSC Microsoft issues and concerns.
Agency IT Manager	SAO	Glynis Gibson	Agency Representative	Advise and inform the State CIO of SAO Microsoft issues and concerns.

SITSD Microsoft Enterprise Agreement Renewal Team

The overall goal of the team is to receive input and serve as the decision-making team for the Microsoft Enterprise Agreement Renewal.

- **Objective:** Consider recommendations from the State IT Managers Microsoft Enterprise Agreement Renewal Team, Contract/Licensing Support Team, and Financial Support Team.
- **Objective:** Make all decisions for the Microsoft Enterprise Agreement Renewal.

TITLE	AGENCY	NAME	ROLE	RESPONSIBILITY
State CIO (Chief Information Officer)	DOA/SITSD	Ron Baldwin	Executive Approval	Provides leadership and has overall responsibility for renewal processes and outcome, and serves as final Executive Approver for renewal purposes.
Chief Financial Officer (CFO)	DOA/SITSD	Doug Volesky	Executive Sponsor	Makes financial decisions to ensure a successful renewal. Serves as Executive Sponsor and Executive Approver. Will be kept fully informed of the process in order to adjust financial provisions as new information comes to light, and considers both the costs and benefits of potential changes to the Enterprise Agreement.
CTO (Chief Technology Officer)	DOA/SITSD	Dave Carlson	Technology Management (Server/Database)	Ensures the team is aware of the business value of the software and the operational impact of any disruption to the service it supports. Ensures installation or usage reporting is available to meet Microsoft's requirements, and that any software is properly deployed and counted.



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COO (Chief Operations Officer)	DOA/SITSD	Warren Dupuis	Technology Management (Desktop/Client/Operations)	Ensures the team is aware of the business value of the software and the operational impact of any disruption to the service it supports. Ensures installation or usage reporting is available to meet Microsoft's requirements, and that any software is properly deployed and counted.
CISO (Chief Information Security Officer)	DOA/SITSD	Lynne Pizzini	Security	Provides advice on the security implications of renewal decisions. Consulted as to whether requested information is appropriate for sharing with a third party (if third party request includes details of a technical or policy nature which may impact network security or regulatory concerns). Where the third party has a requirement for data to be supplied either physically or electronically, the CISO (or designee) should confirm the processes required to secure the information.
CIRO (Chief Intergovernmental Relations Officer)	DOA/SITSD	Tammy LaVigne	Interagency/Public Relations	Serves as the central source of departmental information. Assists with development and implementation of communication plan for the renewal. Facilitates information sharing between agencies and SITSD and responds to inquiries made by the public.
Acquisition Management Services Bureau Chief	DOA/SITSD	Brett Boutin	Acquisition Support	Provides strategic acquisition support.
Application Technology Services Bureau Chief	DOA/SITSD	Audrey Hinman	Support	Provides team support.
Business Service Management Bureau Chief	DOA/SITSD	Carol Schopfer	Business Services Support	Provides team support.
Enterprise Services Bureau Chief	DOA/SITSD	Irv Vavruska	Service Owner	Provides expertise and support for desktop software.
Enterprise Technology Systems Bureau	DOA/SITSD	Jerry Marks	Service Owner	Provides expertise and support for server and cloud software.
Financial Management Bureau Chief	DOA/SITSD	Jenifer Alger	Financial Support	Provides expertise and financial support.
Network Technology Services Bureau	DOA/SITSD	Kris Harrison	Technology Support	Provides expertise and support on any technology issues.



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Project Management Office Program Manager	DOA/SITSD	Anita Bangert	Support	Provides team support and expertise as needed.
Software Asset Management Office Program Manager	DOA/SITSD	Maris Cundith	Renewal Process Manager	Provides management of renewal from beginning to end. Duties include establishing the desired make-up of renewal teams, locating and consolidating information needed to conduct the renewal, provide contract details relating to the renewal including license terms and conditions, license metrics, reporting requirements, contract terms, and other relevant information. Serves as primary contact point with Microsoft. Schedules and facilitates meetings with teams and others as necessary.
Strategic Planning Manager	DOA/SITSD	Kyle Hilmer	Financial Support	Provides strategic support.

Microsoft Enterprise Agreement Renewal Contract/License Team

The overall goal of the team is to develop and manage a contract negotiation strategy, which results in a contract that provides maximum benefit, at the lowest cost, for the State.

- **Objective:** Manage contract discussion with Microsoft sales team and Department of Administration Chief Legal Counsel.
- **Objective:** Develop a contract negotiation strategy.
- **Objective:** Inform SITSD Microsoft Enterprise Agreement Renewal Team on progress and provide recommendations for action.

TITLE	AGENCY	NAME	ROLE	RESPONSIBILITY
SAM Program Manager	DOA/SITSD	Maris Cundith	Renewal Process Manager	Planning and oversight for contract support team. Work with MS Team on meetings schedule. Provide weekly status reports to the SITSD MS EA Renewal Team.
Software Contract Specialist	DOA/SITSD	Dale Stout	Lead - Contract Management	Provide contract management subject matter expertise. Develop contract negotiation issues matrix.
Software Licensing & Compliance Specialist	DOA/SITSD	Sean Edgar	Lead - License Management	Licensing subject matter expertise.
SAM Specialist	DOA/SITSD	Deon Olson	Support	Prepare weekly status reports to Renewal Manager. Provide overall support.



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ETSB Bureau Chief	DOA/SITSD	Jerry Marks	Support	Provide overall support.
DOA Chief Legal Counsel	DOA	Mike Manion	Contract Approval	Review and approve contract.

Microsoft Enterprise Agreement Renewal Financial Team

The overall goal of the team is to provide and manage all financial aspects of the renewal process to provide the greatest return on investment from the Microsoft Enterprise Agreement.

- **Objective:** Evaluate projected costs/benefits to identify areas where greater return on investment may be achieved.
- **Objective:** Advise and inform the SITSD Microsoft Enterprise Agreement Renewal Team on progress and provide recommendations for action.

TITLE	AGENCY	NAME	ROLE	RESPONSIBILITY
Chief Financial Officer (CFO)	DOA/SITSD	Doug Volesky	Executive Sponsor	Provide direction for strategic planning for maximizing the value of the renewal.
FSMB Bureau Chief	DOA/SITSD	Jenifer Alger	Financial Support	Provide strategic financial support.
AMSB Bureau Chief	DOA/SITSD	Brett Boutin	Financial Support	Provide strategic financial support.
SAM Program Manager	DOA/SITSD	Maris Cundith	Renewal Process Manager	Planning and oversight for financial support team. Provide weekly status reports to the SITSD MS EA Renewal Team.
Strategic Planning Manager	DOA/SITSD	Kyle Hilmer	Financial Support	Provide strategic financial support.

Microsoft Enterprise Agreement Enrollment Coordinators Team

The overall goal of the Microsoft Enterprise Agreement Enrollment Coordinators Team is to ensure all State agencies are fully aware of, and can manage, specific license entitlements and benefits contained in the Enterprise Agreement.

- **Objective:** Members will participate and represent their agencies in the Enterprise Agreement renewal and annual true-up processes.
- **Objective:** Members will perform Microsoft license management using Microsoft's Volume License Service Center and agency purchasing records.
- **Objective:** Members will develop a communication plan to share information with the enterprise.



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TITLE	AGENCY	NAME	ROLE	RESPONSIBILITY
SAM Program Manager	SAM Program Office	Maris Cundith	Renewal Process Manager	Provides management of renewal from beginning to end. Duties include establishing the desired make-up of renewal teams, locating and consolidating information needed to conduct the renewal, provide contract details relating to the renewal including license terms and conditions, license metrics, reporting requirements, contract terms, and other relevant information. Serves as primary contact point with Microsoft. Schedules and facilitates meetings with teams and others as necessary.
Software License & Compliance Specialist	SAM Program Office	Sean Edgar	Microsoft License and Entitlement Coordinator	Advise and inform members on license quantities, entitlements, compliance, etc. Serve as member of the team until renewal is complete then serve as main contact for team after renewal.
Software Contracts Specialist	SAM Program Office	Dale Stout	Microsoft Contract Coordinator	Advise and inform members on contract options, costs, benefits, etc. Serve as member of the team during and after renewal.
SAM Specialist	SAM Program Office	Deon Olson	Renewal Support	Provide support to team as needed. Serve as member of the team during and after renewal.
Network Administrator	AGR	John Ortman	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
Network Systems Analyst	CORR	Kim Tuttle	Agency Enrollment Coordinator	
Agency IT Manager	DOA	Michael Sweeney	Agency Enrollment Coordinator	
Agency IT Manager	DOC	Larry Krause	Agency Enrollment Coordinator	
	DOJ	Judy Little	Agency Enrollment Coordinator	
	DOR	Peder Cannon	Agency Enrollment Coordinator	



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	DPHHS		Agency Enrollment Coordinator	
SharePoint Administrator/Systems Analyst	JUD	Tim Kosena	Branch Enrollment Coordinator	
	LEG	Josh Gillespie	Branch Enrollment Coordinator	
	MDT	John Levick	Agency Enrollment Coordinator	
	STF	Aaron Mook	Agency Enrollment Coordinator	
Agency IT Manager	SAO	Glynis Gibson	Agency Enrollment Coordinator	
Network Administrator	SOS	Brad Flath	Agency Enrollment Coordinator	
	FWP		Agency Enrollment Coordinator	

RENEWAL SCOPE

In Scope:

The software licenses and software assurance included in the Microsoft Enterprise Agreement and the Dell Reseller agreement are included in the scope of this renewal. The agreements must be renewed at the same time and Microsoft must approve the Dell Reseller Agreement renewal.

Contract Name	Contract Owner	Contract Manager	Product Type	Product Platform	Product & Services	Billing Cycle	Renewal Date
Microsoft Enterprise Agreement	SITSD	Dale Stout (SAM Program Office)	Software Subscription & Support	Mid-Tier and Desktop	Windows OS Upgrade, Office, ECal Suite, Other various products	Three equal payments over three years.	May 31, 2014



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Dell Reseller Agreement	SITSD	Dale Stout (SAM Program Office)	Microsoft Enterprise Agreement Purchases	Mid-Tier and Desktop	Windows OS Upgrade, Office, ECal Suite, Other Enterprise Agreement products	Three equal payments over three years, plus annual true up costs	May 31, 2014
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Out of Scope:

The renewal does not include Microsoft Select Plus, Premier Support, or SHI Reseller Agreements.

Contract Name	Contract Owner	Contract Manager	Product Type	Product Platform	Product & Services	Billing Cycle	Renewal Date
Microsoft Select Plus Agreement	SITSD	Deon Olson (SAM Program Office)	Software Subscription & Support	Mid-Tier and Desktop	Various	Annual	Evergreen
Microsoft Premier Support	SITSD	Deon Olson (SAM Program Office)	Support	All Microsoft Products	All Microsoft Products	Annual	June 25, 2014
SHI WSCA Reseller Agreement	SITSD	Steve Haynes (AMSB)	Microsoft Select Plus Purchases	Mid-Tier and Desktop	Various	As needed	June 2, 2014

Timeline (Under Construction)



COMMUNICATION MANAGEMENT PLAN (UNDER CONSTRUCTION)

The purpose of the Communication Management Plan is to define what communications are planned for this renewal and how they will be managed.

Communication Management Roles and Responsibilities

This table lists high-level responsibilities for communication management.

Role	Responsibilities
Renewal Process Manager	<ul style="list-style-type: none">• Develop Communication Management Plan• Ensure renewal status reports are generated and distributed• Schedule and facilitate meetings as needed• Facilitate communication at the executive level
SITSD Renewal Team	<ul style="list-style-type: none">• Review project status reports• Advise and inform SAM Program Office of desired actions